

Bethpage Virtual VITA Program.



February 1st – April 11th 2024

The Volunteer Income Tax Assistance (VITA) Program offers free tax help for low to moderate income (generally \$65,000 and below) individuals and families. Bilingual assistance in English/Spanish is available by appointment only. Please see below for appointment details. Services are subject to availability.

Get scheduled for a Virtual VITA appointment today!

1. Do you need to complete your 2023 tax return?
2. Did you make less than \$65,000 in income?
3. Do you have a personal computer or laptop, with a webcam and secured internet access?
4. Are you familiar with video conference software?
5. Do you have a valid and secure email address?
6. Do you have basic computer skills?
7. Do you know how to download and upload pictures and/or documents from your smartphone, laptop, or tablet?



If you answered **YES** to all seven of these questions, you may be eligible for free virtual tax preparation services through the Virtual VITA program! **Scan the QR code to learn more.**

The Bethpage Virtual VITA program utilizes online software and technology to connect the Taxpayer and Tax Preparer:

1. Taxpayers will need to complete the “Bethpage VITA Appointment” application through lovebethpage.com/vita in order to be scheduled for a video conference appointment.
2. Bethpage representatives will contact Taxpayers by phone or email within 48-72hrs of completing the “Bethpage VITA Appointment” application to schedule the taxpayer for an available “Video Intake & Interview” appointment.
3. Bethpage representatives will go over the instructions for the “Video Intake & Interview” appointment and send a link with details and instructions on how to complete the necessary IRS forms, as well as upload tax documents into a secure online system.
4. Bethpage representatives will assist Taxpayers in completing the necessary IRS forms and upload tax documents during the “Video Intake & Interview” process, as well as schedule Taxpayers for their “Video Quality Review” appointment.
5. Bethpage representatives will contact Taxpayers to review completed tax returns and collect their electronic e-file signature authorization at time of “Video Quality Review” appointment.
6. Bethpage representatives will E-File the Taxpayers completed Federal and NY State tax returns and provide taxpayers with a copy of their completed tax returns in PDF form.

IRS Certified Volunteers Providing Free Tax Preparation.

IRS VITA/TCE return preparation sites are operated by certified volunteers. Site operating hours and services offered may be limited. Please be advised that you may not be immediately served. Your patience and understanding are appreciated.

Bethpage VITA sites will prepare:

- **Acceptable forms:**
W2, 1099-Int, 1099-Div, 1099-G, SSA-1099, W2-G, 1098-T, 1095-B or 1095-C, 1099-R
(only if taxable amount determined on Box 2a)
- **Types of Income:**
Wages, salaries, etc. (Form W-2)
Interest Income (Form 1099-INT),
Dividends Received (Form 1099-DIV),
State Tax Refunds (Form 1099-G),
Unemployment Benefits (Form 1099-G),
Gambling Winnings (Form W-2G)
- **Certain Tax Credits:**
Child Tax Credit
Earned Income Credit
Education Credits (Form 1098-T)
- **Limited Types of Income**
IRA Distributions (Form 1099-R) limited
Pension Income (Form 1099-R) limited
Social Security Benefits (Form SSA-1099)
- Basic tax returns only
- Standard deductions only
- Only Federal and New York State Tax Returns

Bethpage VITA sites will not prepare:

- No outside of NY income
- Certain Pension & Retirement Income without taxable amounts determined on Box 2a (1099-R, RRB-1099, CSA-1099)
- Certain Social Security Benefits (Form RRB-1099)
- Self-Employment Income: Cash Based, Uber/Lyft, Ride Share, Food delivery services, etc. (1099-Misc, 1099-NEC, 1099-K)
- Sale of Home (Form 1099-S)
- Schedule A "Itemized Deductions": 1098 Mortgage Interest, Real Estate Taxes, Personal Property Taxes, Medical & Dental expenses
- Cancellation of Debt (Form 1099-C)
- Schedule C with loss, depreciation or business use of home
- Schedule D "Capital Gains and Losses": Crypto, E-Currency Investments, Sale of Stocks (1099B)
- Credits for Sick Leave and Family Leave for certain Self-Employed Individuals (Form 7202)
- Form SS-5 (request for Social Security Number)
- Form 8814 (child taxed at parent's tax rate)
- Form 8606 (non-deductible IRA)
- Form SS-8 (determination of worker status for purposes of federal employment taxes and income tax withholding)
- Marketplace Health Insurance (Form 1095-A)
- Parts 4&5 of Form 8962 (Premium Tax Credits)
- *Form W-7 application for Individual Taxpayer Identification Number (ITIN)*
- *Returns with casualty/disaster losses*
- *Prior year and amended tax returns*

Please remember to have the following:

- Photo identification for you and your spouse (if filing joint return)
- Social Security cards or Individual Taxpayer Identification Number documents for you, your spouse, and all dependents
- Birth dates for you, your spouse, and all dependents
- A copy of last year's tax return (for reference)
- Proof of income (Forms W-2, 1098, and 1099)
- Information for other income
- Proof of Health Insurance (Form 1095-B or 1095-C)
- Information for all deductions/credits
- Total paid to day care provider, their name, address and tax ID number
- For direct deposit of refund: proof of account number and routing number
- For married filing joint returns, both spouses must be present at appointments

For more information, visit lovebethpage.com/vita, call (516) 349-4288 or email us at community@bethpagefcu.com.